

Purpose

This Job Aid is intended to outline expectations of adjusters, customer service reps, when taking a live call.

Teams Impacted

- Claims
- Customer service

Procedure

1. Greet the caller Thank you for calling AAS this is.... Can I please have your claim # or last 6 of the vin. Then follow Sop for Contract Holder Search & Verification to pull up the contract/claim information.
2. Now that the claim is pulled up you must read the detailed **[Notes]** for was last done. Make sure to search **[General]** to check for the status update note, look for the newest created date/time to the right of the screen.

Related	Details	Interactions	Estimate	Coverage Details	Notes	Source/Order Parts	Authorizations	Payable
<div> <input type="text" value="Search"/> <input type="text" value="general"/> </div>								
Category ↓	Notes	CreatedBy	Created Date/Time					
General	Seller CI- advised we need pics/estimate	Brooke Thomas	04/15/2022 02:28 PM					
General	CH CI WANTING TO ESC IMMEDIATELY BC OF NO MOVEMENT. TT ESC	Melissa Cadet	05/13/2022 08:22 AM					
General	Mike Jones at the rf will need to callback with pressure reading from the a/c system, block test on the engine, Will need to CH statement and service records last 12mos Once information is called back in will need to process ac concern with pressure reading for compressor failures, Will also need to document diag from block test to move claim based off findings	Johnnie Martinez	05/17/2022 08:08 AM					
Claim	adv rf to send in est and pics of pan removal to records	Christopher Levensky	04/11/2022 11:01 AM					

3. Now is the time to verify where we are in processed on the claim so far, start by checking for the following:
 - a. 3c's in detail
 - b. Are records/tow bill needed?
 - c. Customer statement noted
 - d. Estimate keyed in
 - e. Do we need to set inspector or have pictures sent in?
 - f. Sourcing after failure demonstrated
 - g. Key in most cost-effective part to claim
4. Depending on the notes will help see what steps from #3 you're on.

5. Process the missed information to help move the claim forward
6. If the caller needs to send any information or inspection has been sent out, a Pending Status note must be entered under General category. Make sure to include A-C so the next adjuster that gets that call on this claim keeps the claim moving in the same direction.
 - a. What is needed from Repair facility?
 - b. What is needed from the customer?
 - c. Next step once information is collected



Notes

Category
General

Notes
Mike Jones at the RF verified failures to ac still needs more diag on engine to get to pof
CH sent in all information needed waiting to auth TEARDOWN to RF to pof
Mike will get auth from ch to open timing cover of engine to verify failure will call back with estimate

Cancel Save

Save Notes

IMPORTANT: Ensure you are setting your status note under the General category. This will provide an easier means of sorting notes.


7. If you have collected the detailed information and you can auth the claim, let's get the claim authorized.
8. If the claim is denied, please make sure you note the claim in detail on why claim is denied and follow the denial process per SOP.

9. Once you have made movement on the claim as a courtesy to the assigned adjuster, send them a **[Task]** of the updated information made on the claim.

New Task: Task

Task Information

Name

 Search Contacts...


*Subject

Other

*Task Type

Power Train

Assigned To

 Johnnie Martinez

*Task Reason

Follow Up


1 Total Task

Due Date

Other Reason Details

I have processed the ac portion of the claim and Mike Jones will call back after timing cover is off to verify failures

Related To

 2010249

Additional Information

*Priority

Normal

Save & New

Cancel

Save

Approval & Revision

Date Created 5/13/2022	Created By Johnnie Martinez	Date Approved 5/17/2022	Approved By Jason Dolan
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]
			Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]
			Approved By [Approver's Name]
Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]
			Approved By [Approver's Name]



Job Aid: Claims Documentation

Date Revised [Date]	Revised by [Revisor Name]	Revision Description [Enter what has changed from the previous version]	Date Approved [Date]	Approved By [Approver's Name]
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